USER GUIDE

Administrators and Editors

Version 2.0

DATA.GOV.UK Beta
Opening up Government

Index

Account types	3
Administrators	4
Editors	5
Getting an account	6
Becoming an editor	8
Administrators user guide	10
Editors user guide	17
Add a dataset	23
Editing a dataset	37
Tags	41
Glossary	46
FAQ	49

Account types

Welcome, this guide will help you through the process of using Data.gov.uk as an administrator or an editor and using the account tools to maximize your experience of the site.

The first step is to understand the different account types and what they are for.

Administrators

The administrator account serves to manage all editors creating/editing metadata under a given parent department. You can check the publication hierarchy for Data.gov.uk on the publishers page, under the 'Publisher Hierarchy' tab . Administrators can create editors within its hierarchy or across the family of publishers and is the person that will approve your editor rights request.

- First point of contact for FOI request (unless otherwise specified by the publisher)
- Creates editors and other administrators
- Moderates the activity of editors across its hierarchy

Editors

Editors are the people in charge of creating metadata records for their organisations in Data.gov.uk. They have the ability to create and edit metadata for their assigned organisation. Editors also have the responsibility of checking the comments on their record often as to capture ideas, clarify questions users of the data may have or discover, via feedback on the page, issues with the quality of the data.

- Creates and edits metadata records for their organisation
- Takes implied responsibility for keeping up to date with questions and issues with their records raised in the comments section of the metadata record page

Getting an account

1- Click on the sign up link on the top right of the screen

2- Follow the steps in the form

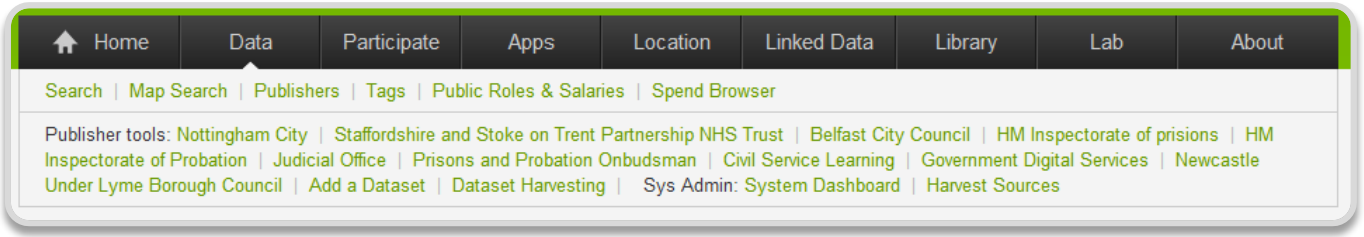
3- Login into your new account, it should look something like this

4- For newly registered users, to register automatically on the catalogue system, click on the data tab, that will make the system recognize you and allow to give you editing rights when requested

Getting an account

1- You have two profiles in the system, the main account profile, reachable from the top login details section

2- And your editor/administrator profile inside the data catalogue, accessible from the data tab (see the pertinent 'managing your account' section depending on your role) This is the profile you will be using most often.


Home
Data
Participate
Apps
Location
Linked Data
Library
Lab
About
Search | Map Search | Publishers | Tags | Public Roles & Salaries | Spend Browser
Publisher tools: Nottingham City | Staffordshire and Stoke on Trent Partnership NHS Trust | Belfast City Council | HM Inspectorate of prisions | HM Inspectorate of Probation | Judicial Office | Prisons and Probation Onbudsman | Civil Service Learning | Government Digital Services | Newcastle Under Lyme Borough Council | Add a Dataset | Dataset Harvesting | Sys Admin: System Dashboard | Harvest Sources

Become an editor

In order to be able to create or edit datasets you will have to request editor rights from an administrator, follow these steps:

1- Click on the data tab in the menu bar of Data.gov.uk and select publishers

2- Find the publisher for which you need editor permissions

3- Click on the request editor rights button

4- Select the entity for which you want editor rights and provide the reasons for this

The administrator for this entity will consider the request and grant access if appropriate

Note: The login process is the same for all users.

Your editor/administrator account details reside under the data tab in the menu bar

ADMINISTRATORS

Managing your account

This section assumes that you have logged in with an administrator account

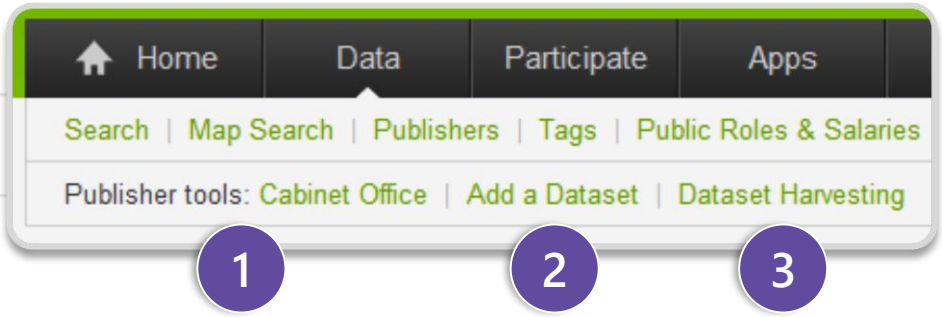
Administrator Tools

On the data tab, you have access to the tools to manage your account

1 The name of the entity you have Admin rights for (it could be several), click one to enter the management screen for it

2 You can add a dataset directly from the menu

3 This is only for those managing UKLP metadata records

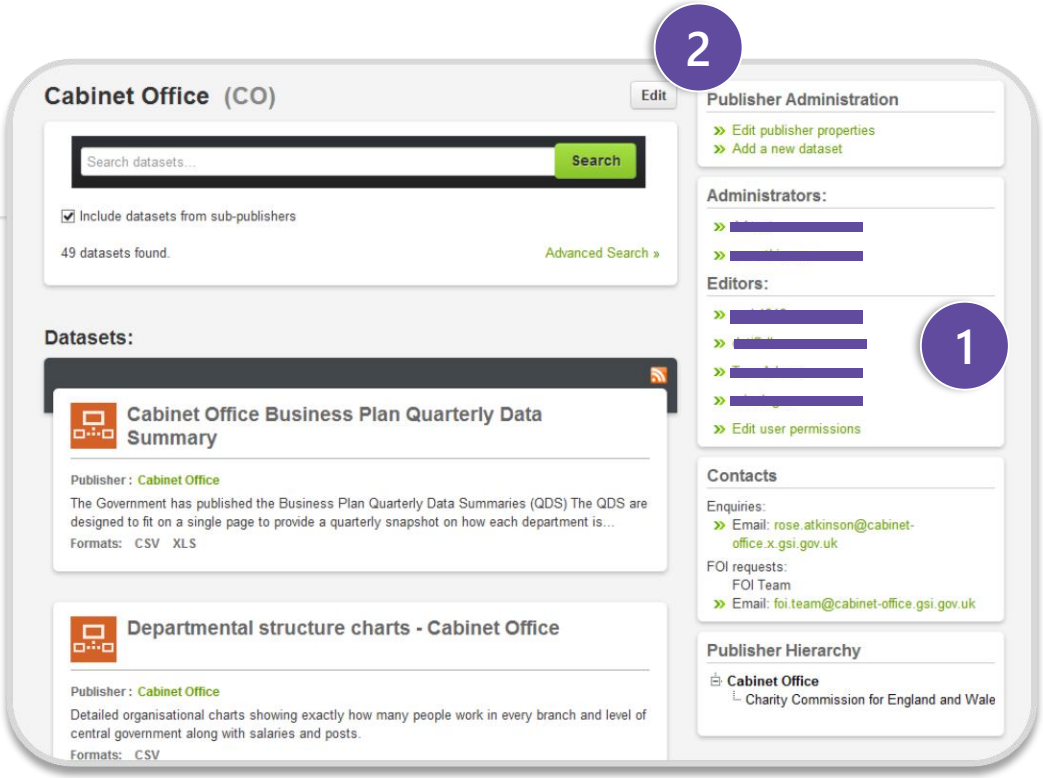


Administrator Tools

Clicking your account brings up all of the records for your publishing entity

1 Manage editors for your entity (also edit permissions)

2 You can add a dataset from here as well as modify the details for your entity such as FOI details or contact details. These are the contact details associated with your records (both by the link and the edit button)


2
Cabinet Office (CO)
Edit
Search datasets...
Search
Include datasets from sub-publishers
49 datasets found.
Advanced Search »
Datasets:
Cabinet Office Business Plan Quarterly Data Summary
Publisher : Cabinet Office
The Government has published the Business Plan Quarterly Data Summaries (QDS) The QDS are designed to fit on a single page to provide a quarterly snapshot on how each department is...
Formats: CSV XLS
Departmental structure charts - Cabinet Office
Publisher : Cabinet Office
Detailed organisational charts showing exactly how many people work in every branch and level of central government along with salaries and posts.
Formats: CSV
Publisher Administration
» Edit publisher properties
» Add a new dataset
Administrators:
Editors:
1
» Edit user permissions
Contacts
Enquiries:
» Email: rose.atkinson@cabinet-office.x.gsi.gov.uk
FOI requests:
FOI Team
» Email: foi.team@cabinet-office.gsi.gov.uk
Publisher Hierarchy
Cabinet Office
Charity Commission for England and Wale

Administrator Tools

Editing user permissions

1 Here you can manage which user has what rights regarding your publishing entity

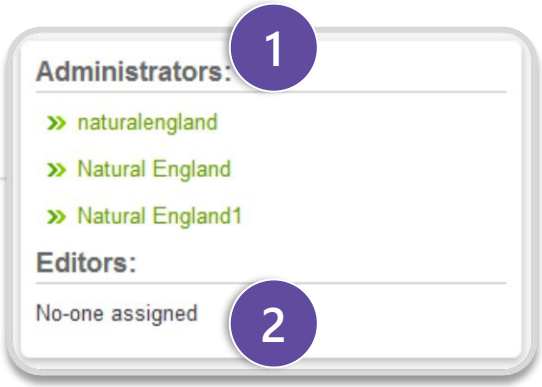
2 Here you can add new users, there is an autocomplete function, just start typing the username you wish to add and then click save, A list of suggested users will appear for you. When you come back to this screen the user will be added and you can change their permissions

Administrator Tools

Clicking your account brings up all of the records for your publishing entity

1 Here you can see those users with administrator rights for your entity

2 Here you can see those who can edit/create metadata for your entity



Administrator Tools

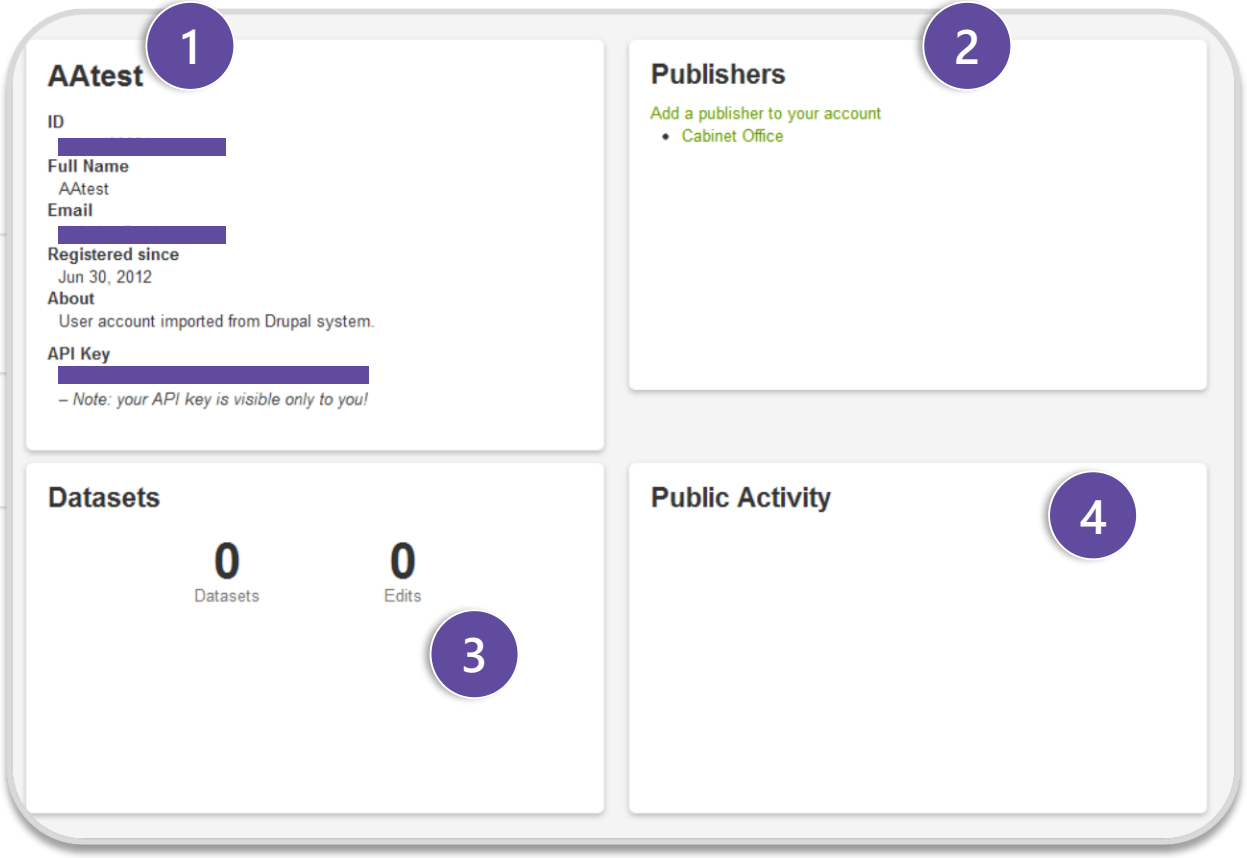
Your Administrator account page gives you key information

1 This is where you'll find your account details. Your API key is used by your IT department for automated creation of records.

2 Here you can add rights to publish for another entity (besides your existing one)

3 Here you will see the number of dataset uploaded by you and also how many edits you have done to a record

4 Any social activity across the site will be collected here (comments, etc.)



EDITORS

Managing your account

This section assumes that you have logged in with an editor account

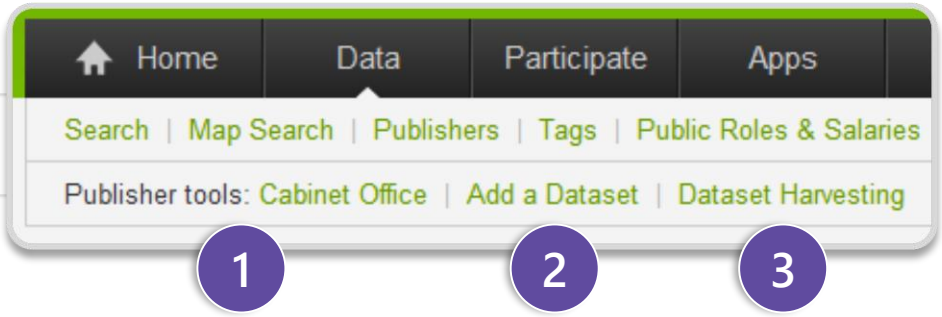
Editor Tools

On the data tab, you have access to the tools to manage your account

1 The name of the entity you have editor rights for (it could be several), click one to enter the management screen for it

2 You can add a dataset directly from the menu

3 This is only for those managing UKLP metadata records, do not use it unless you know exactly how to use it.

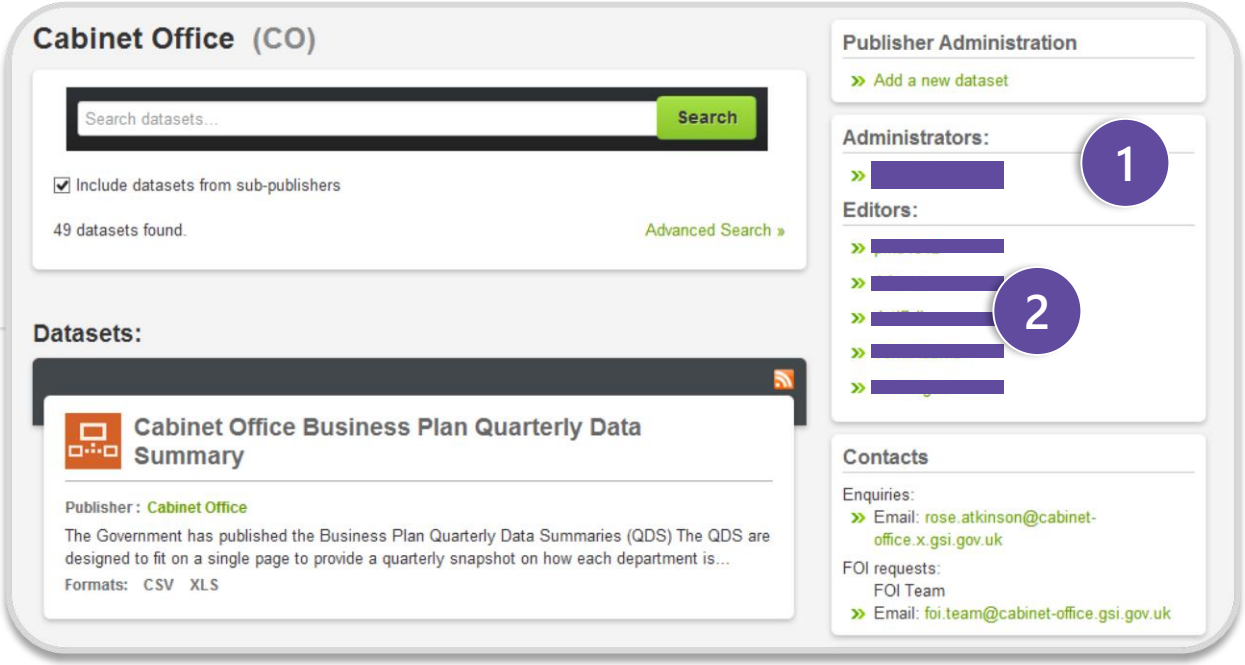


Editor Tools

The publisher page allows you to manage your activities

1 This is the name of the administrator for your account, by default it is the administrator for the parent department, but 'local' administrators can be created by an administrator, contact yours to discuss if you think your entity needs administrator rights

2 You can see other editors across your entity, to find details of your editor account click in your name



Editor Tools

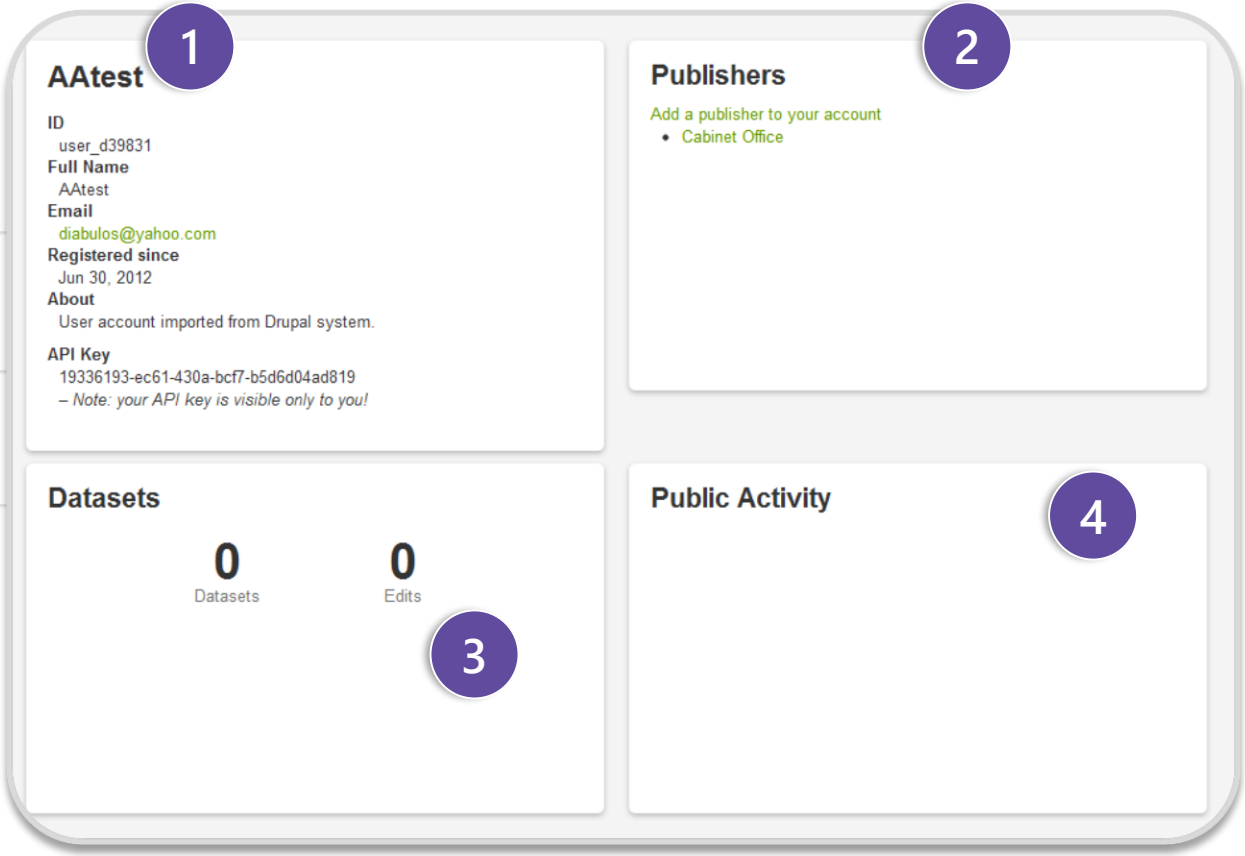
Your editor account page gives you key information

1 This is where you'll find your account details. Your API key is used by your IT department for automated creation of records, talk to your administrator if you think you may need to use it

2 Here you can request rights to published for another entity (besides your existing one)

3 Here you will see the number of dataset uploaded by you and also how many edits you have done to a record

4 Any social activity across the site will be collected here (comments, etc.)

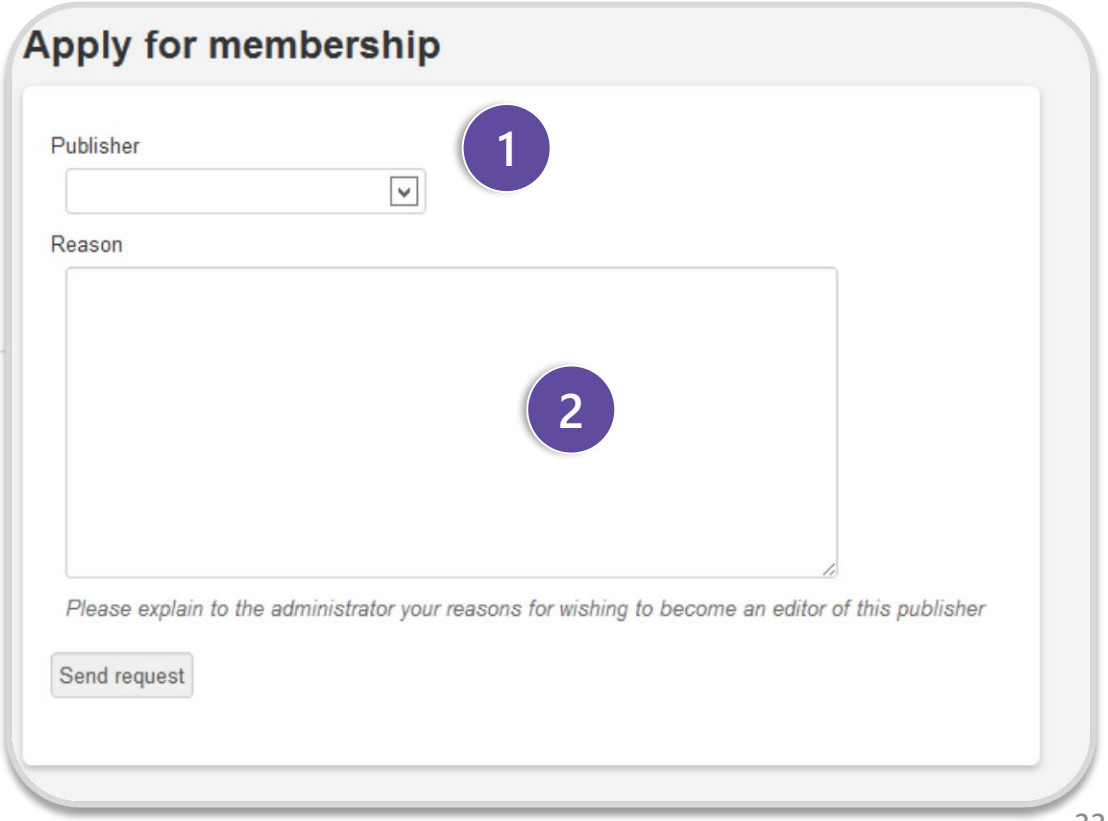


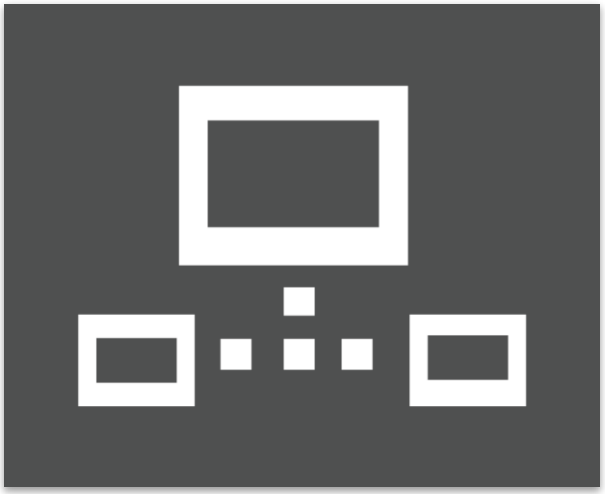
Editor Tools

You can request rights to become editor for other publishers

1 Choose the department for which you require editing rights

2 Provide a reason for why you need editing rights



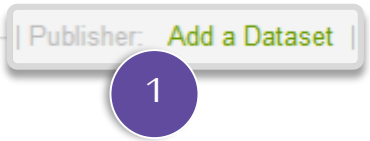


ADD A DATASET

Add a dataset

Go to the data tab in the menu bar

1 If you are an editor, this section allows you to create a new dataset.

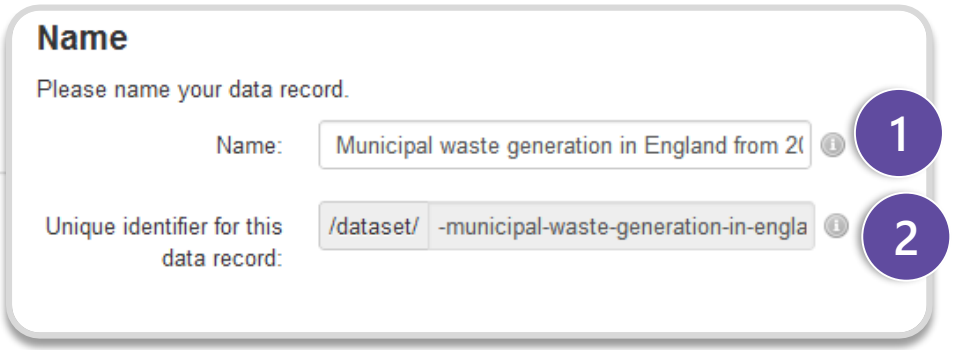


Add a dataset

Name

1 Think of a logical name for your record if you are creating a new one. Check the 'metadata guide' in the library for more info

2 This is where the dataset will be located in DGUK once created, you don't need to do anything with it



Add a dataset

Data files

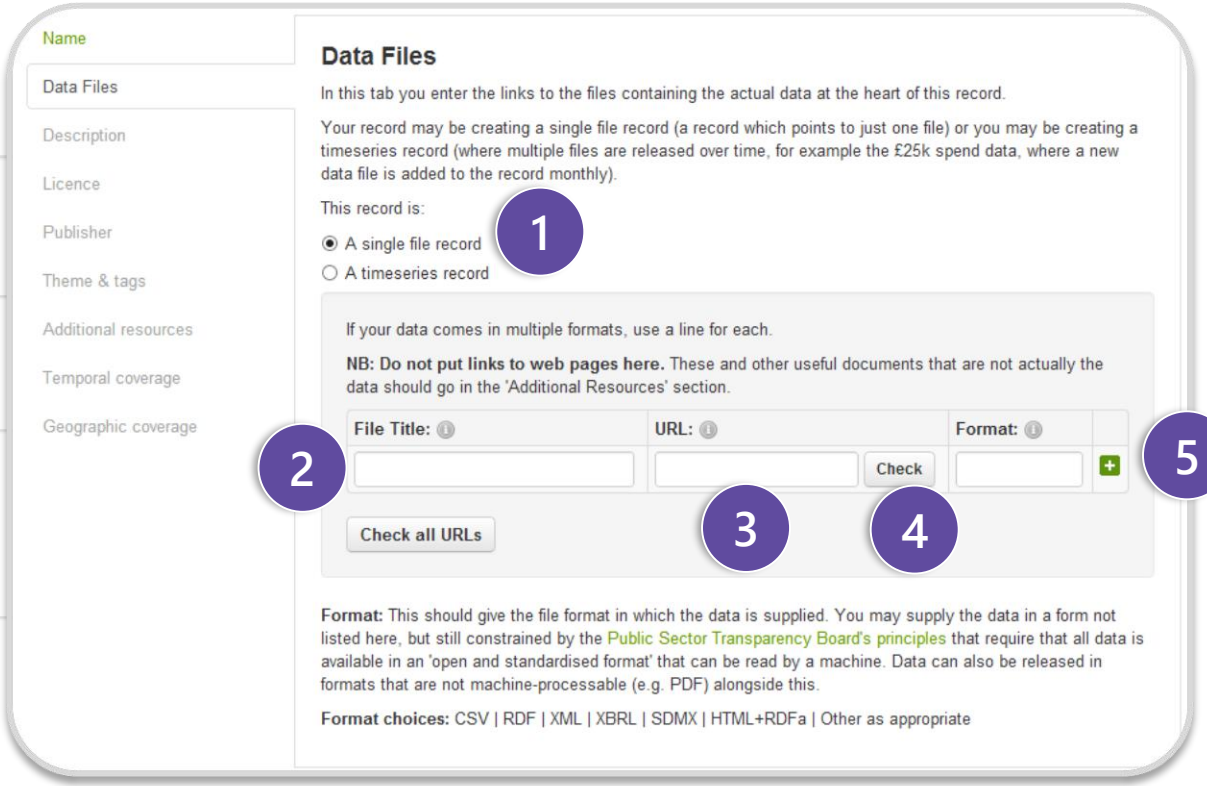
1 Choose if you are creating a single file record (a record for a one off file) or a time series, for a single file…

2 Give the file a comprehensive title, be succinct (i.e. Bird population in Essex by type)

3 Provide the link to the file, not to an html page, but to the file directly. Format will be added automatically

4 You can then check if the address is correct by using the 'check url' button or check all after you have finished adding the links

5 You can add more files (some returns, even if they are single may contain more than one file) by clicking the plus sign


Name
Data Files
Description
Licence
Publisher
Theme & tags
Additional resources
Temporal coverage
Geographic coverage
Data Files
In this tab you enter the links to the files containing the actual data at the heart of this record.
Your record may be creating a single file record (a record which points to just one file) or you may be creating a timeseries record (where multiple files are released over time, for example the £25k spend data, where a new data file is added to the record monthly).
This record is:
A single file record
A timeseries record
1
If your data comes in multiple formats, use a line for each.
NB: Do not put links to web pages here. These and other useful documents that are not actually the data should go in the 'Additional Resources' section.
File Title:
URL:
Format:
Check
2
3
4
5
Check all URLs
Format: This should give the file format in which the data is supplied. You may supply the data in a form not listed here, but still constrained by the Public Sector Transparency Board's principles that require that all data is available in an 'open and standardised format' that can be read by a machine. Data can also be released in formats that are not machine-processable (e.g. PDF) alongside this.
Format choices: CSV | RDF | XML | XBRL | SDMX | HTML+RDFa | Other as appropriate

Add a dataset

Time series

1 A time series record is for files that will have newer iterations as time passes (expenditure, cyclical data, etc.)

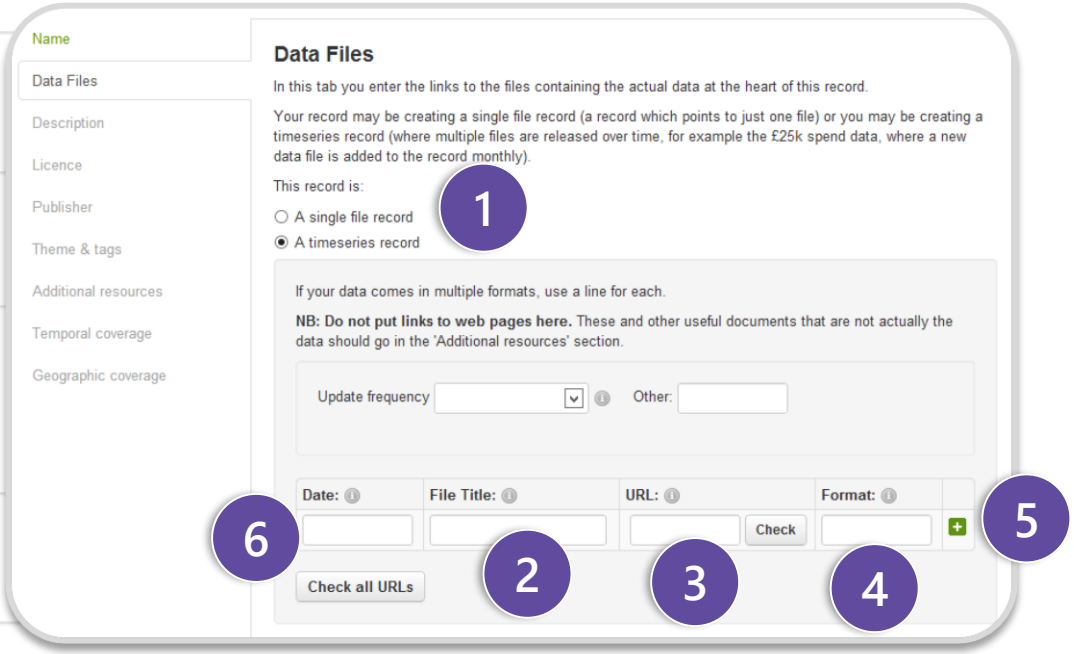
2 Give the file a comprehensive title, be succinct (i.e. Bird population in Essex by type)

3 Provide the link to the file, not to an html page, but to the file directly. Format will de added automatically

4 You can then check if the address is correct by using the 'check url' button or check all after you have finished adding the links

5 You can add more files (some returns, even if they are single may contain more than one file) by clicking the plus sign

6 Provide the date of the file, not the date you are uploading, follow the format suggested


Name
Data Files
Description
Licence
Publisher
Theme & tags
Additional resources
Temporal coverage
Geographic coverage
Data Files
In this tab you enter the links to the files containing the actual data at the heart of this record.
Your record may be creating a single file record (a record which points to just one file) or you may be creating a timeseries record (where multiple files are released over time, for example the £25k spend data, where a new data file is added to the record monthly).
This record is:
A single file record
A timeseries record
1
If your data comes in multiple formats, use a line for each.
NB: Do not put links to web pages here. These and other useful documents that are not actually the data should go in the 'Additional resources' section.
Update frequency
Other:
Date:
File Title:
URL:
Format:
Check
Check all URLs
2
3
4
5
6

'Check' functionality

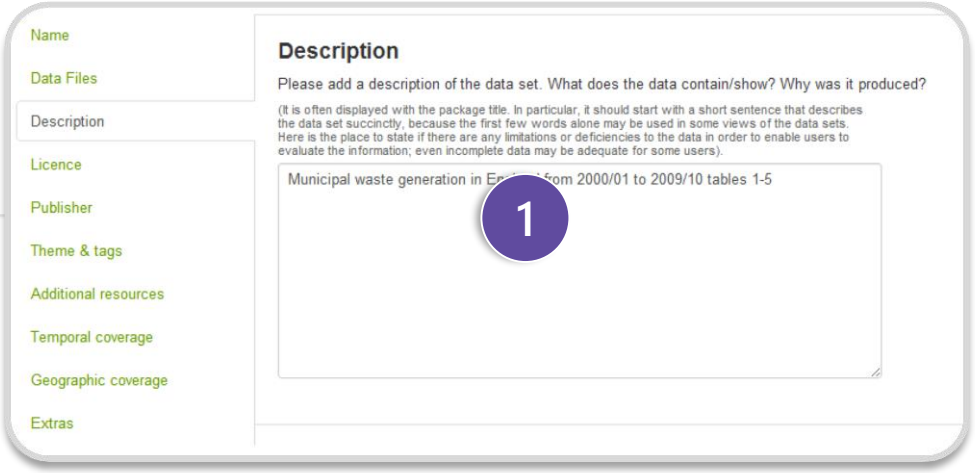
The 'check' functionality allows the system to identify the format of the file and automatically add it to the record, avoiding chances of different spellings. The 'check all URLs' option allows you to check that the URLs entered are all active and working.

If you encounter problems when clicking the 'check' or 'check all URLs' buttons (no format appears in the format box or the check all URLs process takes too long) don't use them and manually enter the format of your file (which SHOULD always be CSV or another open format, NOT XLS, HTML OR PDF) This is because some older browsers like IE7/IE8 may not work well with this feature.

Add a dataset

Description

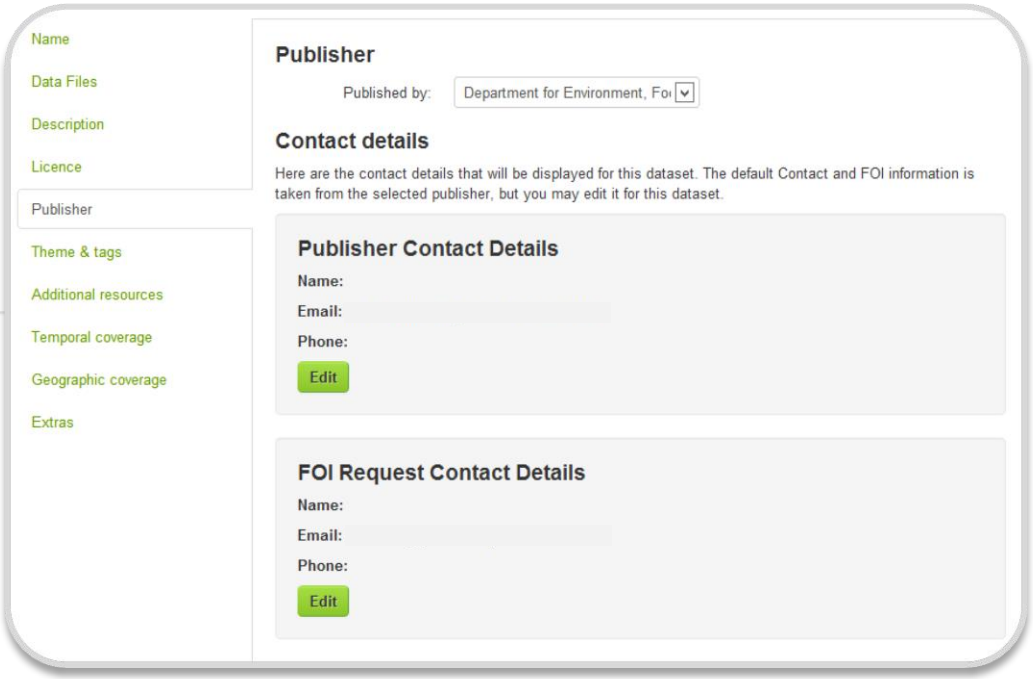
1 Provide as much information about the file as you can, remember that the first few lines of this description will appear in search results


Name
Data Files
Description
Licence
Publisher
Theme & tags
Additional resources
Temporal coverage
Geographic coverage
Extras
Description
Please add a description of the data set. What does the data contain/show? Why was it produced?
(It is often displayed with the package title. In particular, it should start with a short sentence that describes the data set succinctly, because the first few words alone may be used in some views of the data sets. Here is the place to state if there are any limitations or deficiencies to the data in order to enable users to evaluate the information; even incomplete data may be adequate for some users).
Municipal waste generation in
from 2000/01 to 2009/10 tables 1-5
1

Add a dataset

Publisher

1 This information is provided from our records. If the details are wrong you can modify them, but let us know as well at team@data.gov.uk



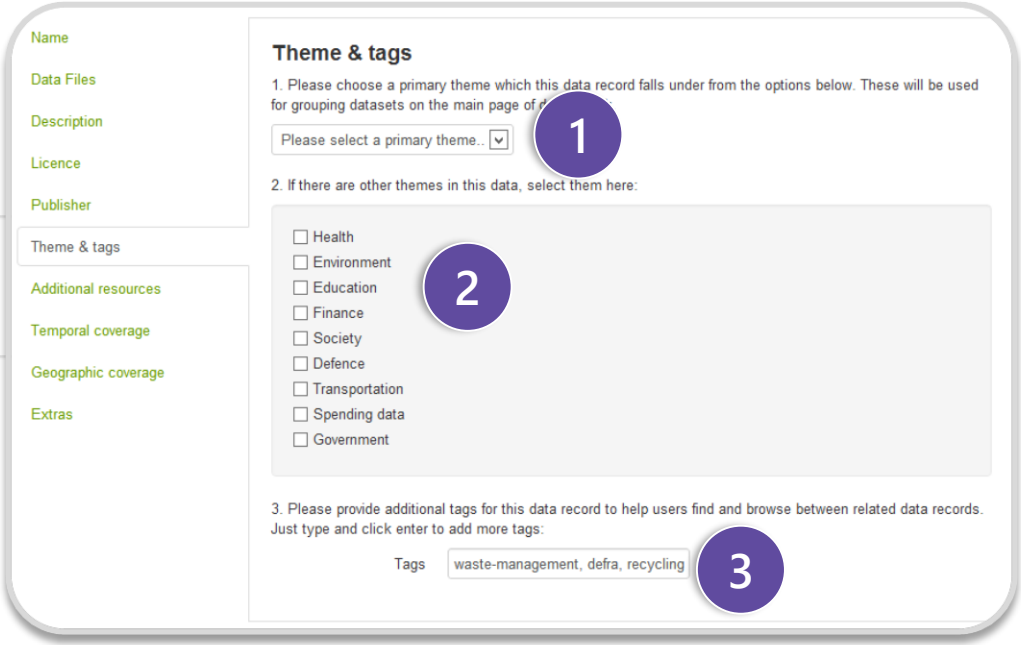
Add a dataset

Theme & Tags

1 Select a primary theme from the drop down, this are top level tags that place the record within a specific 'area'

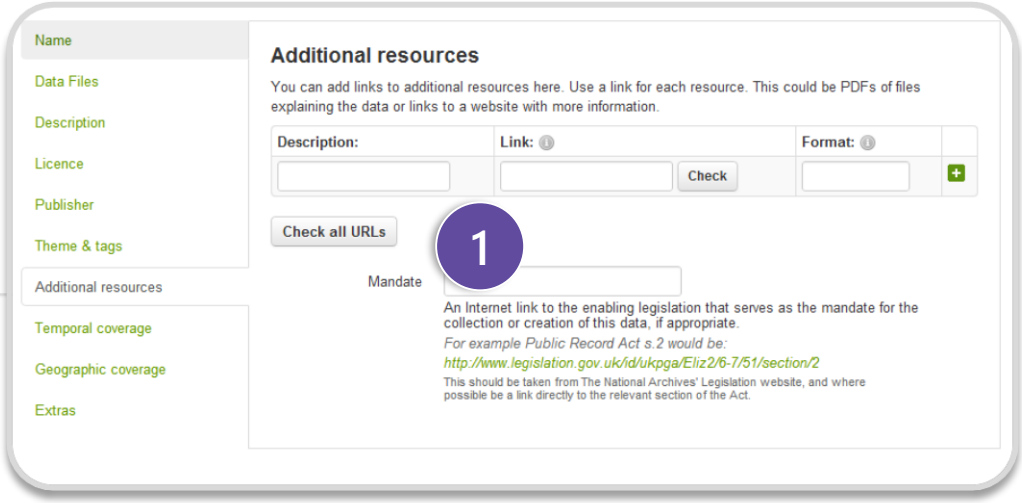
2 From the same list, choose a secondary granularity for the theme

3 Provide your own tags for the file. See the TAGS section in this guide for a primer on creating tags



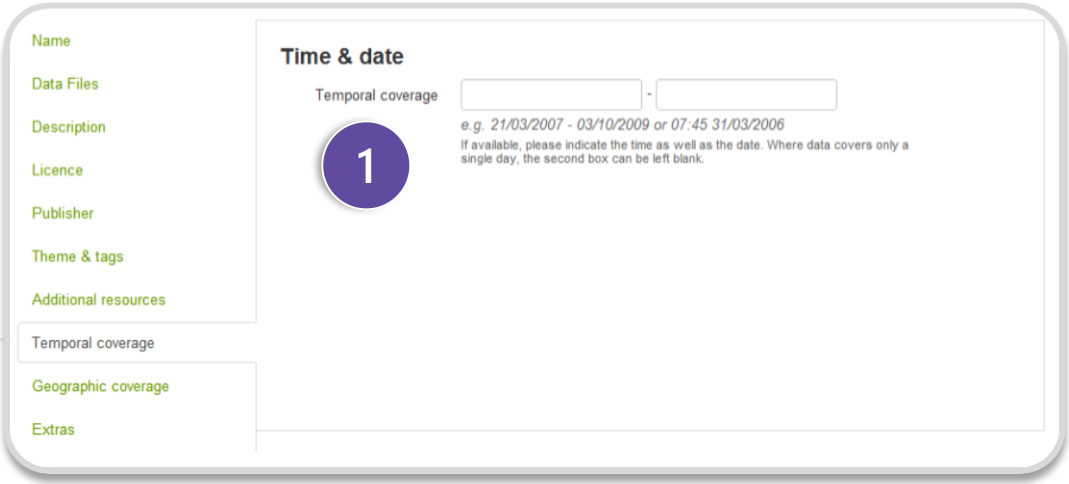
Add a dataset Additional

1 Here you can enter links to any other document or page that provides more information on the data


Name
Data Files
Description
Licence
Publisher
Theme & tags
Additional resources
Temporal coverage
Geographic coverage
Extras
Additional resources
You can add links to additional resources here. Use a link for each resource. This could be PDFs of files explaining the data or links to a website with more information.
Description:
Link:
Format:
Check
Check all URLs
1
Mandate
An Internet link to the enabling legislation that serves as the mandate for the collection or creation of this data, if appropriate.
For example Public Record Act s.2 would be:
http://www.legislation.gov.uk/id/ukpga/Eliz2/6-7/51/section/2
This should be taken from The National Archives' Legislation website, and where possible be a link directly to the relevant section of the Act.

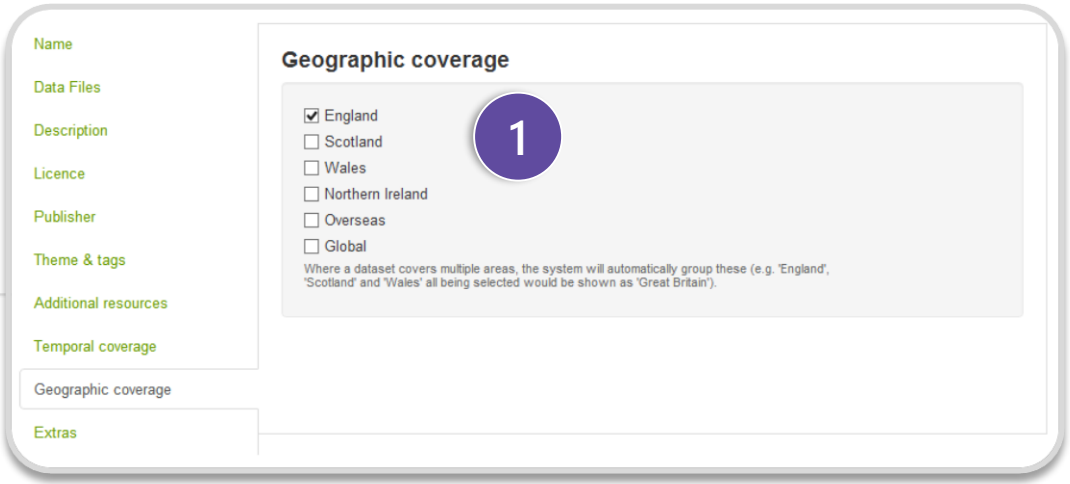
Add a dataset Temporal

1 If the data covers a range of dates (i.e. all sales from 2010 to 2012) provide them here, FOLLOW THE DATE FORMAT SPECIFIED



Add a dataset Coverage

1 Give us an idea of the geographical coverage of the data



Add a dataset

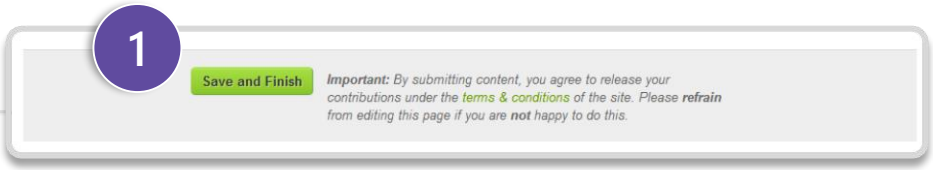
Extras

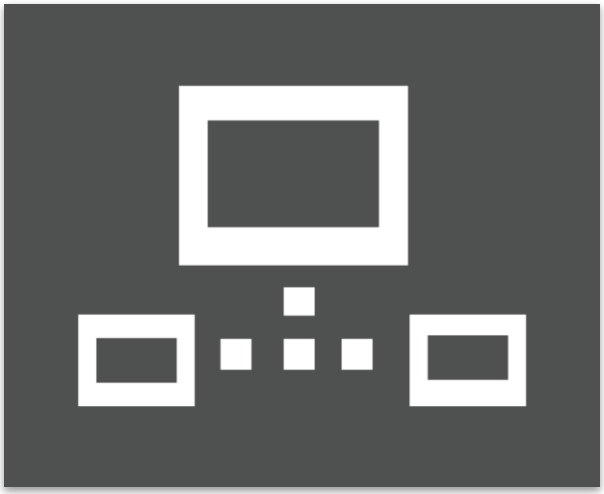
The extra section only appears under very specific circumstances, if you can't see it, then you don't need to worry about it.

Add a dataset

Save & Finish

1 You can now save and finish the creation/editing process


1
Save and Finish
Important: By submitting content, you agree to release your contributions under the terms & conditions of the site. Please refrain from editing this page if you are not happy to do this.



EDITING

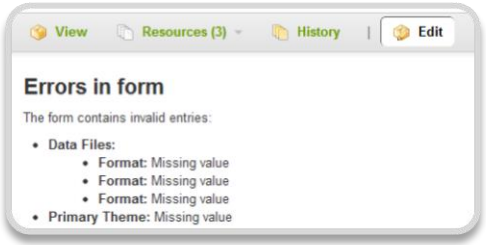
Editing a record

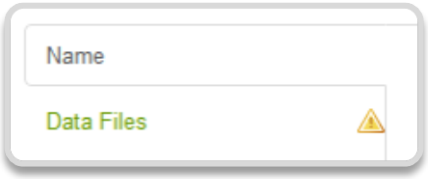
Errors

Editing a record uses the same simple metadata screen as in adding a dataset, a couple of things to have in mind:

1. We have introduced a theme structure to the tags, as you are editing an existing record, it may not have a theme selected, before you save, you must go to the themes section and add them.

2. If something is missing, after clicking save and finish, you will still be presented with the edit screen and a yellow triangle will appear next to the section that needs attention, the system will also tell you what the problem is at the top of the screen above the name tab.





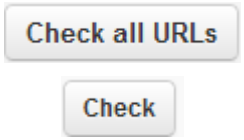
Editing a record

Errors

You know everything went ok when you click 'save and finish' and you are taken to the record view screen, **if** after clicking 'save and finish' you are still in the editing screen then

YOUR CHANGES HAVE NOT BEEN SAVED!

'Check' functionality



The 'check' functionality allows the system to identify the format of the file and automatically add it to the record, avoiding chances of different spellings. The 'check all URLs' option allows you to check that the URLs entered are all active and working. If you encounter problems when clicking the 'check' or 'check all URLs' buttons (no format appears in the format box or the check all URLs process takes too long) don't use them and manually enter the format of your file (which ideally SHOULD always be CSV or another open format, NOT XLS, HTML OR PDF) This is because some older browsers like IE7/IE8 may not work well with this feature.

TAGS

**Tag icon designed by Caserta John Caserta, 2011, The Noun Project*

Tags

Tags are one of the most important aspects of record creation. Proper and efficient tagging means your data will be accurately matched against search criteria.

Let's say we have a record and it is called:

Accident and Fatalities across southeast London 2006-2011

The record has a listing of accidents, against the roads on where they happened, type of vehicle involved (just generic type like sedan, lorry, motorcycle, no model) Weather conditions at the time and a column with number of fatalities if any. Let's say the file is a report produced every five years and it is known in the vernacular as AFSL.

There is no need to include the title as a tag, a logical set of tags could be:
Roads fatalities highways London southeast

Notice that tags are separated by spaces and tags with compound words have their internal spacing identified by a dash, roads is self-explanatory, so is highways and London and southeast, fatalities is in the title but it does not hurt to include it as it is a very specific key term regarding what the file deals with.
Thematically the logical choices would be:
Transport

Secondary tags we could choose:
Health or Society

We could then look at any other level of granularity we could include, if the file is compiled primarily by the AA on behalf of the publisher, even if the file does not mention that in its content, it is worth adding AA as a tag. This is an example of where the knowledge of the publisher can provide further accuracy. We could choose to add the terms lorry, sedan and motorcycle as tags, this will give further granularity as the search engine does not know what's inside the file and someone may be looking for data on motorcycles, any data.

Spelling and repetition

When you start entering your tags, one thing to have in mind is the spelling of your key terms. Stay in the singular unless it makes absolute sense to use plural (like fatalities above), so you would avoid motorcycles lorries sedans and stick with motorcycle lorry sedan. The search engine autosuggests as soon as you start typing so users will be able to see what spelling has been used across the catalogue, hence if we all stay with motorcycle, the chances are that as the user starts typing moto…, they will see one tag and only one tag; motorcycle

Ignore capitals in tags, stay to lower case no matter what.

Don't rely on tags alone, enter proper metadata

Example, a file called

Protected birds and their numbers in the midlands

This file is annual, contains number of birds, species classification, location by ward and entity in charge of protecting it

First, we would tag this as bird, not birds, we would probably also choose midlands (no caps) and species . We would ignore entities because there are too many to mention and the file is not about those entities but about the birds. We ignore ward because you would have added that on the geographical details on the metadata, we ignore location because by including ward you have set location. We would also ignore annual because we would have created a timeseries for this file and choose annual. Of course, we would also ignore numbers!

Our search will include items on the metadata record besides tags to zoom into the right results. Attempting to improve accuracy by tags is not only kind of lazy; it also leads to incomplete records.
Filling in the metadata properly also saves you time. The success of data.gov.uk is heavily linked to your care when filling in metadata.

GLOSSARY

**Tag icon designed by Caserta John Caserta, 2011, The Noun Project*

Glossary

Administrator: A person in charge of managing all editor accounts and corporate details for a parent department or an entity

API: (Application Programming Interface) is a set of specifications used by software to talk to each other, in the case of Data.gov.uk, a set of 'commands' that applications can use to directly query the catalogue

Dataset: A dataset is a collection of data. It can contain a single file, several related files or several versions of the same item, such as a dataset for monthly expenditure data.

Editor: In Data.gov.uk, an editor is a person with publishing rights for an entity or parent department. Editors can create new datasets or amend existing ones within those of the organisation they have rights for.

Entity: An entity is a generic term in Data.gov.uk to refer to a publisher. An entity could be a parent department, one of the bodies under a parent department's hierarchy or a combination of both, hence entity allows us to encompass any of those possibilities.

Harvesting: This is the process by which a series of web services and information is 'crawled' (or scanned if you wish) to capture its information, it is mainly used in our map viewing implementation to update dataset records.

JSON: (JavaScript Object Notation) Is a text-based open standard used for the interchange of data in a human readable form.

Parent Department: A term referring to central departments in the UK government or to an entity to which the publisher has a direct reporting link (or the immediate reporting institution above the publisher)

Glossary

Publisher: A publisher is an entity that publishes datasets in Data.gov.uk under its own identity, such as Department for Transport , Natural England, the Audit Commission or the Judicial Appointments Commission.

Record: A record is another name for a dataset, sometimes an easier term to understand when trying to explain the dataset structure in Data.gov.uk.

Resources: Resources are the files that comprise a dataset, generally these are links to the data file itself.

Single file record: This is a record/dataset is a one-off record. It may contain several supporting files, but its nature is fixed in time, it does not get new data added in the future and its core data files do not get updated with a newer version, although links to information files included could be updated if newer, better versions that provide better context are available.

Tag: A tag is a keyword that allows the record to be associated with a specific concept.

Theme: A theme is an overarching tag referring to key sectors (i.e. health, transport) that allows the catalogue to create top level indexes of data related to these sectors, in Data.gov.uk they are pre-set and cannot be modified by Editors or Administrators.

Timeseries record: A time series record is a record/dataset for data that gets updated periodically, be it monthly, quarterly or annually.

URI: (Uniform Resource Identifier) is a string of characters used to identify a resource, in Data.gov.uk they identify a dataset (record).

FaQ

FaQ

If I make a mistake, can I delete a dataset?

You can always go back and edit a dataset but you cannot delete it. If there is a need to delete a dataset you need to contact your administrator or the Data.gov.uk team (from the contact us link in the site)

Should I delete previous versions of a data file when a new version becomes available?

No, we keep historical versions once published, if the dataset is for a single file and a new version of that file is available, simply add it to the record if it the data belongs to a time series simply add it.

Our website has a lovely portal where we publish our data, can I just point to it?

You **must** provide a link to the data file itself, you can always add a link to your portal under the URL option in the extras section of the publishing wizard.

How do I determine what data should be published in Data.gov.uk?

Any data file that is made public by your entity should have a dataset record in Data.gov.uk, the aim is to make as much data available as possible.